





HR Writer Exercises

Exercise 1 – The HR Director requests a report of all ACTIVE Employees (covered and uncovered) that live in Prescott, AZ. Sort the results by Process Level, Last Name and First Name.

Step 1 – Setup your report Author and Title.

- A. Access HR 65.1 – HR Writer Title Creation
- B. In the “Author” field: Using the drop-down, **SELECT** – TRAINING; or **TYPE** - TRAINING
- C. In the “Title” field: **TYPE** – YOURINITIALS LIST OF PRESCOTT EMPLOYEES (Ex. DKG LIST OF PRESCOTT EMPLOYEES)
- D. In the “Type: ” field: **SELECT** - E (Employee)
- E. In the “Frequency” field: **SELECT** - O (On Demand), *this may already be defaulted.*
- F. In the “Spreadsheet Name” field: **TYPE** –YOURINITIALSPRESEMP (DGPRESEMP)
 -  Note – This will be used as the first step to create a CSV file.
- **CLICK** the “Add” button on the menu bar
 -  Note - HR Writer may automatically advance to HR65.2 after clicking Add, if it does not, Click NextScreen.

Step 2 – Define the Data Items to display on your report.

- A. Access HR65.2 – HR Writer Format Item Selection (system should already be on this form from step 1).
- ❖ In the “Selected Items” section of your page:
 - B. **TYPE** “X” in the Select field for *GE Employee* (Employee No.)
 - C. **TYPE** “X” in the Select field for *GE Name-Full* (Full Name)
 - D. **TYPE** “X” in the Select field for *GE Process Level* (Process Level)
 - E. **TYPE** “X” in the Select field for *GE Department* (Department)
 - F. **TYPE** “X” in the Select field for *GE Job Code* (Job Code)
 - **CLICK** the “Change” button on the menu bar
 -  Note - Remember to always click the “Change” tab on top of the page before clicking PageUp or PageDown.)
 - **CLICK** PageDown
- ❖ In the “Items to Select” section of your page:
 - G. **TYPE** “X” in the Select field for *Position*
 - H. **TYPE** “X” in the Select field for *Status*
 - **CLICK** the “Change” button on the menu bar
 - I. In the “Topic” field: Use the drop-down and **SELECT** - ‘E8’ - Address
 - **CLICK** the “Inquire” button on the menu bar
 -  Note – The Inquire button updates the data items displayed in the ‘Items to Select’ section of the form.
 - J. **TYPE** “X” in the Select field for *City*
 - **CLICK** the “Change” button on the menu bar

- **CLICK** the “Next Screen” button on top of the page

Step 3 – Setup the order and length of each data item that will be displayed in the report results.

- A. Access HR65.3 –HR Writer Format Item Order (system should already be on this form from step 2)
- ❖ Data Items selected on the HR65.2 should be displayed on the bottom half of the form. Data items will be displayed in the order they were selected on HR65.2. To complete this task, you must update the Col Nbr field and Length to match the setup below:
 - B. Emp No – Col Number = 1, Length = 8
 - C. Full Name – Col Number = 2, Length = 30
 - D. Process Level – Col Number = 3, Length = 5
 - E. Department – Col Number = 4, Length = 5
 - F. Job Code – Col Number = 5, Length = 8
 - G. Position – Col Number = 6, Length = 12
 - H. Status – Col Number = 7, Length = 2
 - I. City – Col Number = 8, Length = 8
- **CLICK** the “Change” button on the menu bar
- **CLICK** the “Next Screen” button on the menu bar

Step 4 – Define how the report results will be sorted and totaled (how the data appears down the page). For this report we want to sort by Process Levels, then Last Name, First Name. There will be no totals in this report.

- A. Access HR65.4 – HR Writer Print Order (system should already be on this form from step 3)
 - **CLICK** the “PageDown” button on the menu bar
- ❖ In the “Items to Select” section of your page:
 - B. **TYPE** “X” in the Select field for *Process Level*
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the “PageUP” button on the menu bar
 - C. **TYPE** “X” in the Select field for *Name – Last*
 - D. **TYPE** “X” in the Select field for *Name – First*
 - **CLICK** the “Change” button on the menu bar
- ❖ Form should display Process Level, Name – First and Name-Last on the top half of the form. To correct the sort to have Last Name, then First Name you must update the Order field.
 - E. **TYPE** ‘3’ in the Order field next to E1 Name-First
 - F. **TYPE** ‘2’ in the Order field next to E1 Name-Last
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the “Next Screen” button on the menu bar

Step 5 – Define what fields will be used to define as criteria when selecting Employees to display in the report. For this report we want to see only Active Status Employees that live in Prescott. The steps to identify these fields are as follows:

- A. Access HR65.5 – HR Writer Population Selection (system should already be on this form from step 4)
 - **CLICK** the “PageDown” button on the menu bar
- ❖ In the “Items to Select” section of the page
 - B. **TYPE** “X” in the Select field for *Status*
 - **CLICK** the “Change” button on the menu bar
 - C. In the “Topic” field: Use the drop-down and **SELECT** – ‘E8’ - Address
 - **CLICK** the “Inquire” button on the menu bar
 - D. **TYPE** “X” in the Select field for *City*
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the “Next Screen” button on the menu bar

Step 6 – Define the criteria for the fields selected on HR65.5. For this report we must add criteria to include Employees from Prescott and exclude Inactive Status Codes.

- A. Access HR65.6 – HR Writer Population Criteria (system should already be on this form from step 5)
- B. **TYPE**: FC = A, Data Item = 1, Inc/Exc = E, Beginning Value = R1, Ending Value = R3
- C. **TYPE**: FC = A, Data Item = 1, Inc/Exc = E, Beginning Value = U1, Ending Value = U2
- D. **TYPE**: FC = A, Data Item = 1, Inc/Exc = E, Beginning Value = T1, Ending Value = T3
- E. **TYPE**: FC = A, Data Item = 2, Inc/Exc = I, Beginning Value = PRESCOTT
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the HR Writer Inquiry link under Related Links on the left navigation bar

Step 7 – Run the report in inquiry mode using the HR Writer Inquiry Form.

- A. Access HR70 – HR Writer Inquiry (system should already be on this form from step 6)
- B. In the “Author” field: Using the drop-down **SELECT** - TRAINING (if not already selected)
- C. **TYPE (or Select from the drop down)** the Report Title defined in Step 1
- ❖ In the “Selection Criteria” section of the page
 - D. In the “Company” field: **TYPE** ‘1’
 - **CLICK** the “OK” button on the menu bar
 - 👉 A message box will appear
 - **CLICK** “OK” Again

Exercise 2 – Modify the report created in Exercise 1. Add an employee Count by Process Level. Also, include a Grand Total count of all Employees on the report.

Step 1 – Open the report created in Exercise 1, Step 1.

- A. Access the HR65.3 – HR Writer Format Item Order Form
- B. In the “Author” field: Using the drop-down, **SELECT** – TRAINING; or **TYPE** - TRAINING
- C. **TYPE (or Select from the drop down)** the Report Title defined in Exercise 1
 - **CLICK** the “Inquire” button on the menu bar

Step 2 – Setup the report to count the number of Employees.

- A. Click in Print Total field for Employee,
- B. In the “Print Total” field for Employee: Using the drop-down button **SELECT** – Count (C) or **TYPE** ‘C’ in the field.
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the “Next Screen” button on the menu bar

Step 3 – Setup the totaling option to count by Process Level.

- A. Access the HR65.4 – HR Writer Print Order Form
- B. In the ‘Total’ field for Process Level: Using the drop-down button **SELECT** – Print Column Totals (Y) or **TYPE** ‘Y’ in the field.
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the HR Writer Report Request link under Related Links on the left navigation bar

Step 4 – Run the report in report mode using the HR170

- A. Access the HR170 – HR Writer Report Request Form under Related Links
- B. In the ‘Job Name’ field **TYPE**: YOURINITIALS-PRESCE (ex. DKG-PRESCE)
- C. In the ‘Job Description’ field **TYPE**: List of Prescott Employees
- D. In the “Author” field: Using the drop-down, **SELECT** – TRAINING; or **TYPE** – TRAINING
- E. In the “Title” field: **SELECT** Title defined in Exercise 1 – Step 1
- F. In the ‘Company’ field: **SELECT** – 1; or **TYPE** – ‘1’
- G. In the ‘Spreadsheet’ field: **TYPE** ‘Y’
 - **CLICK** the “Add” button on the menu bar
 - **CLICK** Submit Job link under Related Actions on the left navigation bar
 - 👉 The Job Submit form will open
 - **CLICK** ‘Submit’ on the menu bar again
 - **CLICK** on Job Scheduler under Related Links
 - **CLICK** on Active under Filter Options
- H. Check Status of your report job, if status is Active – **CLICK** Refresh.
 - a. You must refresh until your Job disappears from the Active Filter Option, once that happens continue with the next step

- **CLICK** on Completed under Filter Options, **verify** Job is in Normal Completion Status
 - **CLICK** on Reports under Related Links
 - 👉 The Jobs and Reports Queue will open
 - **CLICK** on your report job name from Step B
 - **CLICK** Right Mouse Button
 - **CLICK** on the option to view your report. Option should be View – YOUR REPORT NAME (ex. View dkg_reportname)
 - **CLICK** on Landscape under PDF under View Options
- I. Verify your report results.
- a. To change the view of your report (if desired), then
 - **CLICK** on the file you want to view under Related Reports (there should be two files: the spreadsheet you named on HR65.1 and the report title you created on HR65.1) OR
 - **CLICK** on the format you would like to view the file in under View Options. Spreadsheet can only be viewed in Text. Report file can be viewed in PDF-Landscape or Text OR
 - To download the spreadsheet, **CLICK** on the spreadsheet file under Related Reports, Click on Text under view options, then click on Create CSV File.

Exercise 3 – The Agency Director requests a report that shows a list of Employees that terminated between 01/01/04 and 06/30/04. Sort results by Process Level, Department and Last Name. Count results by Department, including a Grand Total.

Step 1 – Setup your report Author and Title.

- A. Access HR65.1 – HR Writer Title Creation
- B. In the “Author” field: Using the drop-down, **SELECT** – TRAINING; or **TYPE** - TRAINING
- C. In the “Title” field: **TYPE** – YOURINITIALS EMP TERMED 01/01-06/30/04 (Ex. DKG EMP TERMED 01/01-06/30/04)
- D. In the “Type: ” field: **SELECT** - E (Employee)
- E. In the “Frequency” field: **SELECT** - O (On Demand), *this may already be defaulted.*
- F. In the “Spreadsheet Name” field: **TYPE** – YOURINITIALSTERMEMP (EX. DGTERMEMP)
 - 👉 Note – This will be used as the first step to create a CSV file.
- **CLICK** the “Add” button on the menu bar
 - 👉 Note - Note - HR Writer may automatically advance to HR65.2 after clicking Add, if it does not, Click NextScreen.

Step 2 – Define the Data Items to display on your report.

- A. Access HR65.2 – HR Writer Format Item Selection (system should already be on this form from step 1).

❖ In the “Selected Items” section of your page:

- B. **TYPE** “X” in the Select field for *GE Employee* (Employee No.)
- C. **TYPE** “X” in the Select field for *GE Name-Full* (Full Name)
- D. **TYPE** “X” in the Select field for *GE Department* (Department)
- **CLICK** the “Change” button on the menu bar
- **CLICK** PageDown

❖ In the “Items to Select” section of your page:

- E. **TYPE** “X” in the Select field for *Status*
- F. **TYPE** “X” in the Select field for *Termination Date*
- **CLICK** the “Change” button on the menu bar
- **CLICK** the “Next Screen” button on top of the page

Step 3 – Setup the order and length of each data item that will be displayed in the report results.

- A. Access HR65.3 –HR Writer Format Item Order (system should already be on this form from step 2)

❖ Data Items selected on the HR65.2 should be displayed on the bottom half of the form. Data items will be displayed in the order they were selected on HR65.2. To complete this task, you must update the Col Nbr field and Length to match the setup below:

- B. Emp No – Col Number = 1, Print Total = C (Count), Length = 8,
- C. Full Name – Col Number = 2, Length = 30
- D. Department – Col Number = 3, Length = 5
- E. Status – Col Number = 4, Length = 2
- F. Termination Date – Col Number = 5, Length = 8
- **CLICK** the “Change” button on the menu bar
- **CLICK** the “Next Screen” button on the menu bar

Step 4 – Define how the report results will be sorted and totaled (how the data appears down the page). For this report we want to sort by Process Levels, then Department, then Last Name. Total will be number of Employees per Department.

- A. Access HR65.4 – HR Writer Print Order (system should already be on this form from step 3)
- **CLICK** the “PageDown” button on the menu bar

❖ In the “Items to Select” section of your page:

- B. **TYPE** “X” in the Select field for *Process Level*
- **CLICK** the “Change” button on the menu bar
- **CLICK** the “PageUp” button on the menu bar

❖ In the “Items to Select” section of your page:

- C. **TYPE** “X” in the Select field for *Department*
- D. **TYPE** “X” in the Select field for *Name – Last*

- **CLICK** the “Change” button on the menu bar
- E. In the ‘Total field’ for Department: Using the drop-down button **SELECT** – Print Column Totals (Y) or **TYPE** ‘Y’ in the field.
- ❖ Form should display Process Level, Department and Name-Last on the top half of the form. If it does not, complete steps F & G.
- F. **TYPE** ‘2’ in the Order field next to E1 Department
- G. **TYPE** ‘3’ in the Order field next to E1 Name-Last
- **CLICK** the “Change” button on the menu bar
- **CLICK** the “Next Screen” button on the menu bar


Step 5 – Define what fields will be used to define as criteria when selecting Employees to display in the report. For this report we want to see only Employees terminated between 01/01/04 and 06/30/04. The selection fields will be selected as follows:

- A. Access HR65.5 – HR Writer Population Selection (system should already be on this form from step 4)
- **CLICK** the “PageDown” button on the menu bar
- ❖ In the “Items to Select” section of your page:
- B. **TYPE** “X” in the Select field for *Termination Date*
- **CLICK** the “Change” button on the menu bar
- **CLICK** the “Next Screen” button on the menu bar

Step 6 – Define the criteria for the fields selected on HR65.5. Define the Population Criteria to include Termination Dates between 01/01/04 and 06/30/04. Your rules will be defined as follows:

- A. Access HR65.6 – HR Writer Population Criteria (system should already be on this form from step 5)
- B. **TYPE**: FC = A, Data Item = 1, Inc/Exc = I, Beginning Value = 01/01/2004, Ending Value = 06/30/2004
- **CLICK** the “Change” button on the menu bar
- **CLICK** the HR Writer Report Request link under Related Links on the left navigation bar

Step 7 – Run the report in report mode using the HR170

- A. Access the HR170 – HR Writer Report Request Form under Related Links
- B. In the ‘Job Name’ field **TYPE**: YOURINITIALS-TERM (ex. DKG-TERM)
- C. In the ‘Job Description’ field **TYPE**: Term Emp 01/01/04-06/30/04
- D. In the “Author” field: TRAINING (if not already selected)
- E. In the “Title” field: **SELECT** Title defined in Step 1
- F. In the ‘Company’ field: **SELECT** – 1; or **TYPE** – ‘1’
- G. In the ‘Spreadsheet’ field: **TYPE** ‘Y’
- **CLICK** the “Add” button on the menu bar
- **CLICK** Submit Job link under Related Actions on the left navigation bar
-  The Job Submit form will open
- **CLICK** ‘Submit’ on the menu bar again

- **CLICK** on Job Scheduler under Related Links
 - **CLICK** on Active under Filter Options
- H. Check Status of your report job, if status is Active – **CLICK** Refresh.
- a. You must refresh until your Job disappears from the Active Filter Option, once that happens continue with the next step
- **CLICK** on Completed under Filter Options, **verify** Job is in Normal Completion Status
 - **CLICK** on Reports under Related Links
 - 👉 The Jobs and Reports Queue will open
 - **CLICK** on your report job name from Step B
 - **CLICK** Right Mouse Button
 - **CLICK** on the option to view your report. Option should be View – YOUR REPORT NAME (ex. View dkg_reportname)
 - **CLICK** on Landscape under PDF under View Options
- I. Verify your report results.
- a. To change the view of your report (if desired), then
 - **CLICK** on the file you want to view under Related Reports (there should be two files: the spreadsheet you named on HR65.1 and the report title you created on HR65.1) OR
 - **CLICK** on the format you would like to view the file in under View Options. Spreadsheet can only be viewed in Text. Report file can be viewed in PDF-Landscape or Text OR
 - To download the spreadsheet, **CLICK** on the spreadsheet file under Related Reports, Click on Text under view options, then click on Create CSV File.

Exercise 4 – The Agency Director requests a report that lists all ACTIVE Employee’s Birthday and Home Address. Sort the results by Birth Month, Process Level and Last Name.

Step 1 – Setup your report Author and Title.

- A. Access HR65.1 – HR Writer Title Creation
- B. In the “Author” field: Using the drop-down, **SELECT** – TRAINING; or **TYPE** - TRAINING
- C. In the “Title” field: **TYPE** – YOURINITIALS ACTIVE EMP BIRTHDAY LIST (Ex. DKG ACTIVE EMP BIRTHDAY LIST)
- D. In the “Type: ” field: **SELECT** - E (Employee)
- E. In the “Frequency” field: **SELECT** - O (On Demand), this may already be defaulted.
- F. In the “Spreadsheet Name” field: **TYPE** – YOURINITIALSBDAY (EX. DGBDAY)
- **CLICK** the “Add” button on the menu bar
- 👉 Note - HR Writer may automatically advance to HR65.2 after clicking Add, if it does not, Click NextScreen.

Step 2 – Access HR65.2 - Select Data Items to display on your report, selected items will be:

- A. Access HR65.2 – HR Writer Format Item Selection (system should already be on this form from step 1).

- ❖ In the “Selected Items” section of your page:
 - B. **TYPE** “X” in the Select field for *GE Name-Full* (Full Name)
 - C. **TYPE** “X” in the Select field for *GE Process Level* (Process Level)
 - D. **TYPE** “X” in the Select field for *GE Department* (Department)
 - **CLICK** the “Change” button on the menu bar
 - E. In the “Topic” field: Use the drop-down and **SELECT** - ‘E5’ - Personal Information
 - **CLICK** the “Inquire” button on the menu bar
- ❖ In the “Items to Select” section of your page
 - F. **TYPE** “X” in the Select field for *Birthdate – Month*
 - G. **TYPE** “X” in the Select field for *Birthdate – Day*
 - **CLICK** the “Change” button on the menu bar
 - H. In the “Topic” field: Use the drop-down and **SELECT** - ‘E8’ – Address
 - **CLICK** the “Inquire” button on the menu bar
- ❖ In the “Items to Select” section of your page
 - I. **TYPE** “X” in the Select field for *Address Line 1*
 - J. **TYPE** “X” in the Select field for *Address Line 2*
 - K. **TYPE** “X” in the Select field for *City*
 - L. **TYPE** “X” in the Select field for *State or Prov*
 - M. **TYPE** “X” in the Select field for *Postal Code*
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the “Next Screen” button on the menu bar

Step 3 – Setup the order and length of each data item that will be displayed in the report results:

- A. Access HR65.3 –HR Writer Format Item Order (system should already be on this form from step 2)
- ❖ Data Items selected on the HR65.2 should be displayed on the bottom half of the form. Data items will be displayed in the order they were selected on HR65.2. To complete this task, you must update the Col Nbr field and Length to match the setup below:
 - B. Process Level – Col Number = 1, Length = 5
 - C. Department – Col Number = 2, Length = 5
 - D. Employee Full Name – Col Number = 3, Length = 30
 - E. Birthdate – Month – Col Number = 4, Length = 2
 - F. Birthdate – Day – Col Number = 5, Length = 2
 - G. Address Line 1 – Col Number = 6, Length = 30
 - H. Address Line 2 – Col Number = 7, Length = 14
 - I. City – Col Number = 8, Length = 10
 - J. State or Prov – Col Number = 9, Length = 2
 - K. Postal Code – Col Number = 10, Length = 10
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the “Next Screen” button on the menu bar

Step 4 – Define how the report results will be sorted and totaled (how the data appears down the page). For this report we want to sort by Birth Month, Process Level, then Last Name. There will be no totals in this report. The sort is setup as:

- A. Access HR65.4 – HR Writer Print Order (system should already be on this form from step 3)
- B. In the “Topic” field: Use the drop-down and **SELECT** - ‘E5’ – Personal Information
 - **CLICK** the “Inquire” button on the menu bar
- ❖ In the “Items to Select” section of your page:
 - C. **TYPE** “X” in the Select field for *Birthdate – Month*
 - D. **TYPE** “X” in the Select field for *Birthdate - Day*
 - **CLICK** the “Change” button on the menu bar
- ❖ Form should display Birthdate – Day, then Birthdate – Month. You need to reverse the Order to sort Birthdate – Month first, then Birthdate – Day. To do so, complete steps E & F.
 - E. **TYPE** ‘1’ in the Order field next to E5 Birthdate – Month
 - F. **TYPE** ‘2’ in the Order field next to E5 Birthdate – Day
 - **CLICK** the “Change” button on the menu bar
 - G. In the “Topic” field: Use the drop-down and **SELECT** - ‘E1’ – Employee Master
 - **CLICK** the “Inquire” button on the menu bar
 - **CLICK** the “PageDown” button on the menu bar
- ❖ In the “Items to Select” section of your page:
 - H. **TYPE** “X” in the Select field for *Process Level*
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the “PageUp” button on the menu bar
- ❖ In the “Items to Select” section of your page:
 - I. **TYPE** “X” in the Select field for *Name – Last*
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the “Next Screen” button on the menu bar

Step 5 – Define what fields will be used to define as criteria when selecting Employees to display in the report. For this report we want to see only Active Employees. The selection fields will be selected as follows:

- A. Access HR65.5 – HR Writer Population Selection (system should already be on this form from step 4)
- B. In the “Topic” field: Use the drop-down and **SELECT** – ‘E1’ – Employee Master (if E1 is not already displayed)
 - 👉 Note – If E1 is not already selected, you will have to click Inquire
- ❖ In the “Items to Select” section of your page:
 - C. **TYPE** “X” in the Select field for *Status*
 - 👉 Note – If the *Status* field is not displayed, you may have to click PageDown
 - **CLICK** the “Change” button on the menu bar

- **CLICK** the “Next Screen” button on top of the page

Step 6 – Define the criteria for the fields selected on HR65.5. For this report we want to include Active Employees only. Your rules will be defined as follows:

- A. Access HR65.6 – HR Writer Population Criteria (system should already be on this form from step 5)
- B. **TYPE:** FC = A, Data Item = 1, Inc/Exc = E, Beginning Value = T1, Ending Value = T3
- C. **TYPE:** FC = A, Data Item = 1, Inc/Exc = E, Beginning Value = R1, Ending Value = R3
- D. **TYPE:** FC = A, Data Item = 1, Inc/Exc = E, Beginning Value = U1, Ending Value = U2
- **CLICK** the “Change” button on the menu bar
- **CLICK** the HR Writer Report Request link under Related Links on the left navigation bar

Step 7 – Run the report in inquiry mode using the HR Writer Inquiry Form

- A. Access the HR170 – HR Writer Report Request Form under Related Links
- B. In the ‘Job Name’ field **TYPE:** YOURINITIALS-BIRTH (ex. DKG-BIRTH)
- C. In the ‘Job Description’ field **TYPE:** Birthday List
- D. In the “Author” field: Using the drop-down, **SELECT** or **TYPE** – TRAINING
- E. In the “Title” field: **SELECT** Title defined in Step 1
- F. In the ‘Company’ field: **SELECT** – 1; or **TYPE** – ‘1’
- G. In the ‘Spreadsheet’ field: **TYPE** ‘Y’
- **CLICK** the “Add” button on the menu bar
- **CLICK** Submit Job link under Related Actions on the left navigation bar
- 👉 The Job Submit form will open
- **CLICK** ‘Submit’ on the menu bar again
- **CLICK** on Job Scheduler under Related Links
- **CLICK** on Active under Filter Options
- H. Check Status of your report job, if status is Active – **CLICK** Refresh.
 - a. You must refresh until your Job disappears from the Active Filter Option, once that happens continue with the next step
- **CLICK** on Completed under Filter Options, **verify** Job is in Normal Completion Status
- **CLICK** on Reports under Related Links
- 👉 The Jobs and Reports Queue will open
- **CLICK** on your report job name from Step A
- **CLICK** Right Mouse Button
- **CLICK** on the option to view your report. Option should be View – YOUR REPORT NAME (ex. View dkg_reportname)
- **CLICK** on Landscape under PDF under View Options
- I. Verify your report results.
 - a. To change the view of your report (if desired), then
 - **CLICK** on the file you want to view under Related Reports (there should be two files: the spreadsheet you named on HR65.1 and the report title you created on HR65.1) OR

- CLICK on the format you would like to view the file in under View Options. Spreadsheet can only be viewed in Text. Report file can be viewed in PDF-Landscape or Text OR
- To download the spreadsheet, CLICK on the spreadsheet file under Related Reports, Click on Text under view options, then click on Create CSV File.

Exercise 5 – Copy a report from the template author using the XH64.1. Then modify the report to create a list of ACTIVE Employees.

Step 1 – Copy report from the 00-HR author.

- A. Access XH64.1 – HR Writer Title Update
- B. In the “Author” field: Using the drop-down, **SELECT** – TRAINING; or **TYPE** - TRAINING
 - **CLICK** the “Inquire” button on the menu bar
- C. In the ‘FC’ field: **TYPE**: ‘A’
- D. In the ‘Title 1’ field: **TYPE**: YOURINITIALS ACTIVE EMPLOYEES (EX. DKG ACTIVE EMPLOYEES).
- E. In the ‘Author 2’ field: Using the drop-down, **SELECT** – 00-HR; or **TYPE** – 00-HR
- F. In the ‘Title 2’ field: **SELECT** – ‘EMPLOYEE LIST – HRW’ from the drop down.
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the “Inquire” button to see updates to Author

Step 2 – Update the Spreadsheet Name

- A. Access HR65.1 – HR Writer Title Creation
- B. In the “Author” field: Using the drop-down, **SELECT** – TRAINING; or **TYPE** – TRAINING (*if not already selected*)
- C. In the “Title” field: **SELECT** Title defined in Exercise 6, Step 1
 - **CLICK** the “Inquire” button on the menu bar
- D. In the “Spreadsheet Name” field: TYPE YOURINITIALSELIST2 (EX. DGELIST2)
 - **CLICK** the “Change” button on the menu bar

Step 3 – Verify that the status field appears on the HR65.5 because this report should show ACTIVE Employees.

- A. Access HR65.5 – HR Writer Population Selection
- B. Verify that Status appears in the ‘Selected Items’ area of the screen.
 - a. If not, complete these steps:
 - i. In the “Topic” field: Use the drop-down and **SELECT** - ‘E1’ – Employee Master
 - 👉 Note – HR Writer should already be defaulted to ‘E1’ – Employee Master. If you are not in ‘E1’, complete Step H and Click Inquire
 - **CLICK** the “PageDown” button on the menu bar
 - ❖ In the “Items to Select” section of your page:
 - ii. **TYPE** “X” in the Select field for *Status*
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the “Next Screen” button on the menu bar

Step 6 – Define the criteria for the fields selected on HR65.5. For this report we want to include Active Employees only. Your rules will be defined as follows:

- A. Access HR65.6 – HR Writer Population Criteria (system should already be on this form from step 5)
- B. **TYPE:** FC = A, Data Item = 1, Inc/Exc = E, Beginning Value = T1, Ending Value = T3
- C. **TYPE:** FC = A, Data Item = 1, Inc/Exc = E, Beginning Value = R1, Ending Value = R3
- D. **TYPE:** FC = A, Data Item = 1, Inc/Exc = E, Beginning Value = U1, Ending Value = U2
 - **CLICK** the “Change” button on the menu bar
 - **CLICK** the HR Writer Report Request link under Related Links on the left navigation bar

Step 4 – Run report in Report format on HR170

- A. Access the HR170 – HR Writer Report Request Form under Related Links
- B. In the ‘Job Name’ field **TYPE:** YOURINITIALS-ELIST2 (ex. DKG-ELIST2)
- C. In the ‘Job Description’ field **TYPE:** Active Employee List
- D. In the “Author” field: Using the drop-down, **SELECT** – TRAINING; or **TYPE** – TRAINING
- E. In the “Title” field: **SELECT** Title defined in Step 1
- F. In the ‘Company’ field: **SELECT** – 1; or **TYPE** – ‘1’
- G. In the ‘Spreadsheet’ field: **TYPE** ‘Y’
 - **CLICK** the “Add” button on the menu bar
 - **CLICK** Submit Job link under Related Actions on the left navigation bar
 - 👉 The Job Submit form will open
 - **CLICK** ‘Submit’ on the menu bar again
 - **CLICK** on Job Scheduler under Related Links
 - **CLICK** on Active under Filter Options
- J. Check Status of your report job, if status is Active – **CLICK** Refresh.
 - b. You must refresh until your Job disappears from the Active Filter Option, once that happens continue with the next step
- **CLICK** on Completed under Filter Options, **verify** Job is in Normal Completion Status
- **CLICK** on Reports under Related Links
 - 👉 The Jobs and Reports Queue will open
- **CLICK** on your report job name from Step A
- **CLICK** Right Mouse Button
- **CLICK** on the option to view your report. Option should be View – YOUR REPORT NAME (ex. View dkg_reportname)
- **CLICK** on Landscape under PDF under View Options
- K. Verify your report results.
 - b. To change the view of your report (if desired), then
 - **CLICK** on the file you want to view under Related Reports (there should be two files: the spreadsheet you named on HR65.1 and the report title you created on HR65.1) OR
 - **CLICK** on the format you would like to view the file in under View Options. Spreadsheet can only be viewed in Text. Report file can be viewed in PDF-
 - To download the spreadsheet, **CLICK** on the spreadsheet file under Related Reports, Click on Text under view options, then click on Create CSV File.